

Success Plans—Step by Step

Before you can create a Success Plan there are two things that you must do first:

- ❖ Create an Earnings Forecaster for this person verifying information you have gathered from discussion with the customer i.e. level of education and how many months they have worked in the last 12 months.
--To access the Earnings Forecaster on the Internet use this address:
<http://www.wilma.org/forecaster>

From the Earnings Forecaster there are 4 things that you will need for the Success Plan. They are in **bold** on the Forecaster. They are:

1. **Region**-which is the same as the category *
2. **Entry-level wage rate**-remember this is an average of all workers in the lower quartile of the statistics, not the absolute bottom wage.
3. **Target wage rate** –this is a stretch rate to work towards
4. **Monthly Earnings**- which is the target wage rate for 40 hours a week for 4.3 weeks a month

*Categories

4= Low education (less than high school graduation)

Low attachment to the labor market (less than 6 months full time work in the last 12 months-remember to make this full time equivalent work experience)

3= Low education

High attachment to the labor market –more than 6 months in last twelve months

2= High education and Low attachment to the labor market

1= High education and High attachment to the labor market

- ❖ Verify that the information on the **employment screen (05)** in JAS is accurate and that all fields are filled. (For instance, is the address, phone number and contact person fields are complete?)
--Make sure you check all employment records that show they are active (They will have an **A** in form of the record.)
--Use **U** to update any record (**R** will only let you review or look at the record and if you need to make any changes then you will have to back and use **U**)
--If there is no employment record and there should be, you use **PF5** to add a record

Now you are ready to create a Success Plan!

From the main menu select **20** screen. (You can only create the Success Plan once. After that you may only update the plan.) You create a plan by using **PF 5** from the 20 screen.

The first thing you will be asked is whether or not the employment information is accurate. This is why it is smart to do it first.

Next you will be asked to type in the LMI information from the Earnings Forecaster. Remember that Region on the Earnings Forecaster is the same as category.

Once the LMI (or forecaster information) is entered it cannot be changed so be very careful and make sure it is correct before you push enter!!

The **Success Goal** at the very top of the plan should be a specific occupational goal.

The next section is the **Monthly income plan**. Here you document wages, TANF and other income helping the customer see how wages are going up and TANF is decreasing.

These formulas may help you when completing the Monthly income plan.

To determine how much TANF a customer is receiving while working:
Use the chart that shows what is received according to family size and subtract $\frac{1}{2}$ the amount of gross earnings.

To figure out earnings needed to exit TANF:
Add the amount of earnings and double the amount of TANF current received

When you have completed the first page of the success plan push enter and it will take you to the narrative portion.

My Next Step should be just a short statement of what the customer will be doing to work towards the success goal. An example may be to obtain more hours of work.

My Steps to Success is the area to list how this will be accomplished in a very specific step by step plan. If the next step is to obtain more hours of work than the steps may be to speak to the supervisor or the human resources person.

To Support Me in Reaching My Goal, WorkFirst Will: is where you list very specifically what steps you will take to assist the customer in accomplishing their next step. Perhaps you will coach the customer in how to approach their supervisor.

Then you will be asked if you want to add notes (on the 08 screen) and you should make notes about what the customer's goal is, how they plan to accomplish it and any other information you received while speaking with them.

When going back and updating a success plan you will use U to update or R to just review a plan. The most current success plan will be at the top of the list and will be the only plan that you can update. The rest will be listed in chronological order and can only be reviewed.